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FinancialPlanning

# Wealthtech Weekly

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**By Rob Burgess**
Reporter

In this month's Financial Advisor Confidence Outlook (FACO), we asked advisors how comfortable they were using AI at home and work, and what they use it for. Most use it in both places, at least occasionally. But they are more comfortable using it in personal settings.

Where do you use AI? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

**Connect with Rob:**

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TOP STORIES

FACO

# Advisors more comfortable using AI at home than work

With concerns about compliance and client connections, some financial advisors find that double-checking AI can negate the time savings they're hoping for.

- **Advisor confidence rising, but still underwater overall**
  By far the most significant factor behind the jump in this month's Financial Advisor Confidence Outlook (FACO) was the outlook for the overall economy.
- **Affluent investors prefer 'fee-based' planning — but do they understand it?**
  A recent report by Cerulli found that more than one-third of affluent investors said they prefer fee-based planning. But advisors on the ground say clients are often confused about fee-related labels and need help understanding pricing models.
- **10 best and worst crypto ETFs of the past year**

Advisors who have experience with these ETFs say they can offer an easy, secure entry point for investors. However, choosing the right one requires further discretion and research.

- **Advisor offices in residences doubled, with never again 9-5 attitude rising**
  While return-to-office mandates have proliferated, many say you'll never get them back in the cubicle full-time.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM DELOITTE

## Retail investors expect notable growth in private capital by 2030

With existing regulated product structures, investment managers are eyeing retail investors for growth in private capital, predicting allocations to soar from billions to trillions by 2030.

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